

## STANDARDIZED APPOINTMENT TYPES OPERATIONAL DEFINITIONS & SCENARIOS

- ◆ **PCM (Initial Primary Care Appointment)** - The PCM appointment type is designed for the initial primary care visit only. It will be used to schedule the beneficiary's appointment for a first visit to the designated primary care manager. This appointment type is not designed to be used for acute or routine health care issues. The initial PCM appointment will map to the 30-day access standard as given for wellness.

**Scenario** - Mrs. Snuffy, spouse of Lieutenant Snuffy, enrolled in TRICARE Prime (MTF) yesterday. She is not experiencing any acute health problems but wishes to "get established" with the MTF so she calls the 1-800 TRICARE appointment line. Mrs. Snuffy asks the appointment clerk for an appointment at the hospital. The appointment clerk asks Mrs. Snuffy for the appropriate demographic information to establish her identity. Upon seeing the appropriate demographic information (ACV, Enrolled Clinic, PCM, etc) the appointment confirms that Mrs. Snuffy is a TRICARE Prime Enrollee. The appointment clerk (1. Asks Mrs. Snuffy if this is the first time she has asked for an appointment with her PCM. OR 2. Notices by viewing previous appointments that Mrs. Snuffy has not had an appointment with the PCM before.). The appointment clerk asks Mrs. Snuffy if she has any acute health conditions that require she see a doctor within 24 hours. Mrs. Snuffy replies that she is not so the appointment clerk schedules her for a PCM appointment.

- ◆ **SPEC (Initial Specialty Care Appointment)** - The SPEC appointment type is designed for the initial appointment (by consult or referral) to a specialist. A specialty appointment is reserved for care to be delivered by a network or MTF specialist for a specific disease process. The initial specialty care appointment will map to the 30 day Specialty Access-to-Care standard by default, unless a consultation between the referring provider and the specialist specifies that the visit to the specialist must occur sooner. The requirement for a specialist visit to occur sooner than 30 days will be documented on the electronic CHCS Consult Order or other applicable automated consult system. *(NOTE: The concern of the WIPT is that a more defined mechanism may need to be in place, either in the form of business rules or system enhancements to address the following: authorization issues (e.g. how many visits, episode of care, or time period before another consult is required); how will a determination be made as to when a different consult might be needed for a health problem that falls within the scope of care of the specialist but is unrelated to the condition for which the patient was originally referred; under what conditions will a specialist assume the responsibility as PCM for a patient who has complicated health issues).*

**Scenario** - Mrs. Snuffy's PCM (Dr. Smith) notices some abnormalities in a routine examination during her office visit. Dr. Smith is extremely concerned about Mrs. Snuffy's examination and judges that examination beyond the capability of a PCM is necessary to ensure that Mrs. Snuffy does not have a serious health problem. Dr. Smith sends a specific scheduled consult order to the Health Care Finder using the STAT priority. Dr. Smith also calls Dr. Bones, the Specialist, and discusses Mrs. Snuffy's case and the two agree that Mrs. Snuffy doesn't need to be seen immediately, but should be seen within one week. The CHCS Consult Order is reviewed and designated for an appointment specifically with Dr. Bones. As a result of the consultation between Dr. Bones and Dr. Smith the priority is changed to ROUTINE (within 7 days). Mrs. Snuffy is instructed to stop and see the front desk clerk on the way out to schedule the appointment. The clerk, who has access to Dr. Bones schedule, pulls up the consult order on Mrs. Snuffy, understands the instructions in the consult order, and books Mrs. Snuffy an initial specialty care appointment with Dr. Bones within the one-week time frame specified.

## STANDARDIZED APPOINTMENT TYPES OPERATIONAL DEFINITIONS & SCENARIOS

- ◆ **ACUT (Acute Appointment)** - The ACUT appointment type is designed for scheduling appointments for beneficiaries who have a need for non-emergent, urgent care typically delivered by an MTF or network provider. ACUT is synonymous with the intent of "Same Day " appointments. Before an ACUT appointment is scheduled appropriate nurse triage should occur to determine the most appropriate level of treatment for the patient's medical problem. The acute appointment will map to the 24-hour Acute Access to Care category.

**Scenario** - Mrs. Snuffy is experiencing flu-like symptoms and feels that she is in need of prescription medication. She calls the 1-800 TRICARE Appointments line and explains that she needs an appointment to see a health care provider right away. [Alternative Suggestion: There is a telephone option that instructs the patient "If this is an emergency please hang up and dial 911. If you are in need of immediate medical attention which is not an emergency please press ##. The ## selection will automatically dial into a nurse professional who can conduct triage using the appropriately approved protocols.] The appointment clerk pulls up Mrs. Snuffy's demographic information and verifies her identity and TRICARE enrollment status. The clerk verifies that Mrs. Snuffy is seeking an immediate visit with her PCM to get treatment for flu-like symptoms. The clerk transfers Mrs. Snuffy's call to a triage nurse who, using appropriately approved protocols and algorithms, determines whether Mrs. Snuffy needs to have an office visit within 24 hours, can wait for a "Routine" or "Established" patient appointment, or can benefit from health care information or self-help instruction from the nurse. If the triage nurse determines that Mrs. Snuffy does need to be seen by a health care provider within 24 hours she will have access to the PCM clinic appointment schedule and can book an appointment immediately. Note: The concept of "prudent lay person" will be used to make a determination of whether a condition is considered acute and in need of an appointment with 24 hours in those instances where nurse triage is not in place. If Mrs. Snuffy, as a TRICARE Prime enrollee, reasonably feels, as a prudent lay person, that her condition needs attention within 24 hours every effort will be made to ensure she receives an appointment consistently with the order of search priority business rule for appointing and referral.

- ◆ **ROUT (Routine Appointment)** - The ROUT appointment type is designated for patients who require an office visit with the PCM for a new health care problem that is not considered urgent. Patients will be routed through Nurse Triage, where it is in place before the routine appointment is booked. The Nurse Triage can offer other appropriate alternatives for care such as self-care. Based on the approved Nurse Triage protocols, the determination may be made to book an acute appointment. In those locations where Nurse Triage is not in place the concept of "prudent lay-person terminology" will be used in determining whether the patient should be given a routine or acute appointment. If the patient insists on an acute appointment, every effort will be made to book one within access standards using the Order of Precedence for Appointment Search business rule. The ROUT appointment type will map to the 7-day Access-To-Care Standard.

**Scenario** - Mrs. Snuffy has been experiencing a pain in her shoulder joint area for a couple of days and decides to call the 1-800 TRICARE Appointment Line to schedule a visit with her provider. The appointment clerk, using a very general and simple algorithm of questions to determine the patient's needs reaches the decision point to transfer Mrs. Snuffy's call to the Triage Nurse. (Alternate Scenario - The appointment scheduling business model might be set up so that the patient calls directly to the Triage Nurse from the 1-800 TRICARE Appointment Line). The Triage Nurse, using approved protocols, rules out self-care and determines that an acute appointment isn't necessary, but that a routine appointment should be scheduled with her provider within 7 days. Using the Order of Precedence for

## STANDARDIZED APPOINTMENT TYPES OPERATIONAL DEFINITIONS & SCENARIOS

Appointment Search business rule, the Triage Nurse books the appointment and gives the patient appropriate instruction.

- ◆ **WELL (Wellness or Health Promotion appointment)** - The WELL appointment type is designated for patients who require preventive, health maintenance type care. Periodic examinations, check-ups, screenings (e.g. PPIP). The WELL appointment type will map to the 30-day Wellness Access-To-Care standard.

**Scenario** - Mrs. Snuffy calls the 1-800 TRICARE appointment line to ask for an appointment for her periodic physical examination. The appointment clerk pulls up the appropriate screen with demographic information and enrollment status for Mrs. Snuffy. The clerk does a search keyed on WELL appointment types (other appropriate identifiers may also be used for the search; e.g. PCM, detail field information, Wellness Access-To-Care category, etc.) and finds the next available WELL appointment slot. The clerk books the appointment for the patient.

- ◆ **PROC (Procedure Appointment with designated time allotment)** - The PROC appointment type is designated for patients who are determined to be in need of medical procedures other than those that are performed in the Ambulatory Procedure Unit (APU - B\*\*5 MEPRS Clinics). Procedures performed in APUs will be considered Ambulatory Procedure Visits (APVs) and will be scheduled using the CHCS APV subsystem.

**Scenario** - SGT Snuffy had been referred to Gastroenterology. The Gastroenterologist decides that Snuffy needs to come back in one week for an Upper GI examination, which will be performed in the clinic. Alternative 1 - (No scheduling personnel within clinic). The physician enters a consult order into the system for the procedure to be performed. Instructions to be given to SGT Snuffy are included on the consult order. SGT Snuffy is instructed to call the central appointments line and inform them he has a consult for a procedure to be scheduled (or the appointment clerk calls SGT Snuffy). The appointments clerk is able to open AOP and select the consult order (review marked - "appoint to MTF") to schedule an appointment for SGT Snuffy to have the procedure performed. The appointment clerk uses the information on the consult order to remind SGT Snuffy of the physicians' instructions on how to be prepared for the procedure. Alternative 2 (more desirable) - SGT Snuffy is able to stop by the front desk of the clinic and get his appointment scheduled before he leaves the clinic.

- ◆ **EST (Established patient follow-up with designated time allotment)** - The EST appointment type is designated for patients who request appointments with the PCM other than for acute health care, initial PCM appointments, or wellness. The EST appointment will also be used when a patient is being scheduled for follow-up care from a Specialist as well as the PCM.

**Scenario** - Mrs. Snuffy had been seen as an acute patient (using the ACUT) appointment type last week for a severe upper respiratory infection. She is instructed to get a follow-up appointment for one week later to ensure that the antibiotics prescribed work effectively. The PCM may use a Consult Order to provide instruction which will be available for the appointment clerk to properly book Mrs. Snuffy's follow-up appointment. One Alternative\* The patient could call central appointments giving the clerk appropriate information for accessing AOP to find the appropriate reviewed order and book the appointment. Better Alternative\*. The simple, user friendly method would be for the patient to simply relay the physicians instructions for a follow-up appointment next week to the front desk clerk who

## **STANDARDIZED APPOINTMENT TYPES OPERATIONAL DEFINITIONS & SCENARIOS**

should have access to book the patient's appointment using the EST appointment type before she leaves the clinic.

- ◆ **T-CON** - To be determined
- ◆ **GRP** - The GRP (Group) appointment type will be used for patients who must be scheduled for therapy, counseling, or teaching sessions where a provider will perform the intervention in a group setting. The detail field can be used to provide further information as to what the group appointment type is reserved for (e.g. NPCL for New Prenatal Class).